International Post Corporation

Half of online consumers shopped more during the COVID-19 pandemic and also plan to buy more in the future

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- 51% of consumers bought more from domestic e-retailers and 33% bought more from foreign e-retailers due to COVID-19.
- China's share of cross-border e-commerce purchases decreased for the first time in 2020.
- The 2020 IPC survey shows a significant increase in weight and value of cross-border e-commerce purchases.

Brussels, 11 February 2021 -

graph

The 2020 IPC Cross-Border E-commerce Shopper Survey has reached over 33,000 consumers in 40 different countries across North & South America, Asia Pacific, Europe and for the first time in the African continent. The countries included in the scope of the survey are IPC member countries , plus China, Estonia, Indonesia, India, Japan, Latvia, Lithuania, Mexico, Morocco, Nigeria, Poland, Russia, Slovenia, South Africa and South Korea. The countries surveyed account for 95% of the world e-commerce market. The 2020 edition of the shopper survey also looks at the impact that COVID-19 has had on consumers' online purchasing behaviour throughout 2020 and how consumer habits may further change in the future.

Holger Winklbauer, CEO of IPC said: "Over the years, *the IPC Cross-Border E-Commerce Shopper Survey has established itself as one of the largest cross-border e-commerce surveys. This year's edition shows that the COVID-19 pandemic has further accelerated the increase in e-commerce and that this trend is here to stay. Posts have shown their resilience throughout the crisis and continued to serve their clients notwithstanding the challenges. To be able to further benefit from the e-commerce explosion, posts will have to further develop their offerings to best respond to consumers and e-retailers' needs*".

Online shopping has considerably increased due to COVID-19 pandemic

graph

This year's survey showed that 51% of consumers bought more from domestic e-retailers and 33% bought more from foreign e-retailers due to COVID-19.

The biggest increases are found in the online purchase of groceries, clothing and health & beauty products throughout the last year. Eight percent of consumers said that their online purchases from e-retailers based in their own country doubled or more due to the COVID-19 pandemic. Consumers expect to shop more online in the future from e-retailers based in their own countries and from e-retailers based abroad, which presents further opportunities for postal operators.

Cross-border e-commerce: large e-retailers maintain their position while China's share decreased

IPC analysis of respondents' answers shows that of the parcels bought cross-border in 2020, 37% were purchased from China, 13% from the US, 11% from Germany and 10% from the UK. China's share decreased for the first time in 2020. The other three main export markets maintained their market share, with Germany experiencing a slight increase in 2020. Germany's market share has benefitted from neighbouring countries buying cross-border from Germany rather than from further afield due to concerns about COVID-19. Purchases from China were highest in Russia (80%), Eastern Europe and Africa.

The most popular e-retailers remain Amazon (26%), AliExpress (19%), eBay (11%) and Wish (9%). eBay and Wish both saw their market share reduced in 2020.

Significant increase in weight and value of cross-border e-commerce purchases in 2020
In 2020, the reduction in packets coming from China led to a significant change in the weight of cross-border e-commerce purchases. Forty-seven percent of items weighed up to 0.5kg against 52% in the previous edition.

In terms of product value, 16% of purchases were worth less than €10, 22% were valued between €10 and €24, 22% were valued between €25 and €49, 23% were worth between €50 and €99, and 16% were worth €100 or more. The reduction in packets

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coming from China in 2020 also led to a significant change in the value of cross-border e-commerce purchases. The proportion of cross-border items valued below €25 had gradually risen over time, from 36% in 2016 to 44% in 2019. It significantly drops back to 37% in 2020.

Delivery in 1-3 days increases in 2020

When asked how long the purchase took to arrive, 31% of respondents said that the item took 15 or more days. Compared to previous years, cross-border shoppers in 2020 were more likely to experience delivery in 1-3 days or in 15 days or more.

This indicates that deliveries from neighbouring countries are getting faster over time, while deliveries from further afield (i.e., China) are taking longer – likely due to delays with customs and, in 2020, due to COVID-19 restricting the available cargo space on airlines.

Consumer satisfaction

The 2020 survey measured consumer satisfaction with six key elements: delivery cost, delivery location, tracking, delivery speed, customs and returns.

Of these six elements, Delivery speed clearly had the lowest level of consumer satisfaction (39% extremely / very satisfied). This was the case in almost all 40 surveyed markets.

Satisfaction was highest for delivery location (68%) and delivery cost (62%).

To download the key findings from the research, go to www.ipc.be/shopper.

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Scope of the research: The IPC Cross-Border Shopper Survey 2020 took place in 40 countries: Austria, Australia, Belgium, Canada, China, Croatia, Cyprus, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Indonesia, Ireland, India, Italy, Japan, Latvia, Lithuania, Luxembourg, Mexico, Morocco, the Netherlands, New Zealand, Nigeria, Norway, Poland, Portugal, Russia, Slovenia, South Africa, South Korea, Spain, Sweden, Switzerland, the United Kingdom and the United States.
Target group: Frequent cross-border online shoppers, who have bought physical goods online at least once in the last three months and have made a cross-border online purchase in the past year. The target group was determined by quotas based on the age and gender profile of the online population per country.
Methodology: Quantitative research using online access panels supplied by Dynata. Fieldwork took place in October 2020.
Sample size: 33,594 completed responses for all the markets. The sample size was between 100 and 1,000 respondents per country.

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